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Running a Contest to Encourage Timely Monograph Ordering

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Abstract

An age-old problem: Whatever deadline you set for placing monograph orders, you receive a big burst of orders at the last minute. Acquisitions staff beg for book orders one month and get flooded with orders the next. Librarians at Wake Forest University tried to mitigate this problem by running a contest: spend 65% of your target by an early deadline, and your fund wins a share of a cash prize. The presenter will discuss how the contest idea proved an effective incentive for selectors and how it served to make acquisitions work more steadily.

Introduction

To procrastinate is human. Whatever the deadline for any kind of endeavor, many people will submit their work at the last possible moment. At Wake Forest University, monographic collection development (i.e., choosing books, e-books and DVDs for purchase) is a shared responsibility among 25 subject liaisons representing 63 funds. Each fiscal year, the collection management department has set an ordering deadline, usually around March 31. The acquisitions department suffers from a dearth of work one month and a flood of work the next. The rollercoaster effect also impacts departments further down the pipeline, for example, cataloging. Patrons also suffer when books published early in the fiscal year are not available simply because a librarian procrastinated with ordering.

In an effort to address this rollercoaster effect, the collection management staff ran an incentive contest in fiscal year (FY) 2012. Each fund that reaches a smaller target (65% spent) by an earlier January deadline will split a jackpot and can therefore buy even more materials.

Implementation Details

The jackpot was set at \$7,000. This amount was chosen because it was approximately 1% of the monograph portion of the budget. In this case, the money was set aside from the regular/operational collection budget. The library received an overall budget increase in FY12, so this was possible without reducing firm budgets.

Funds were eligible if they corresponded to an undergraduate major or graduate program. These funds tended to be the larger funds. In all, 28 funds were eligible.

The contest was announced to liaison librarians in late August. Liaisons could choose whether to communicate to teaching faculty about the contest. (Departments vary regarding how directly faculty are involved in ordering monographs.)

The early deadline of January 13 was chosen because it was a weekday shortly before classes resumed for the spring semester. Anecdotal evidence suggests that the winter break is a popular time to order books, since librarians are relieved of most public service responsibilities.

An order counted towards the incentive as long as it was submitted to acquisitions before the deadline.

Results

Eleven of the 28 eligible funds met the incentive. An additional fund was very close—within \$100—so I responded by raising the total jackpot to \$7,644, and each winning fund earned \$637. The \$637 was added to each department's normal firm fund, so the cash was easily available for the liaison to spend by the normal March deadline.

Figure 1 shows the spending by month in FY11 versus FY12. Data is based on the "invoice create date" in the Voyager Integrated Library System. Invoices are created when the item is received; for most items, receipt will lag about a month behind the placement of the order with the vendor. In all

of the figures, data is given as percentage of the total spent per month. This approach controls for differences in the total budget across the two years under examination.

because the ineligible funds are, for the most part, significantly smaller than eligible funds.

One could question whether the winners were the funds that tended to place orders early anyway. In

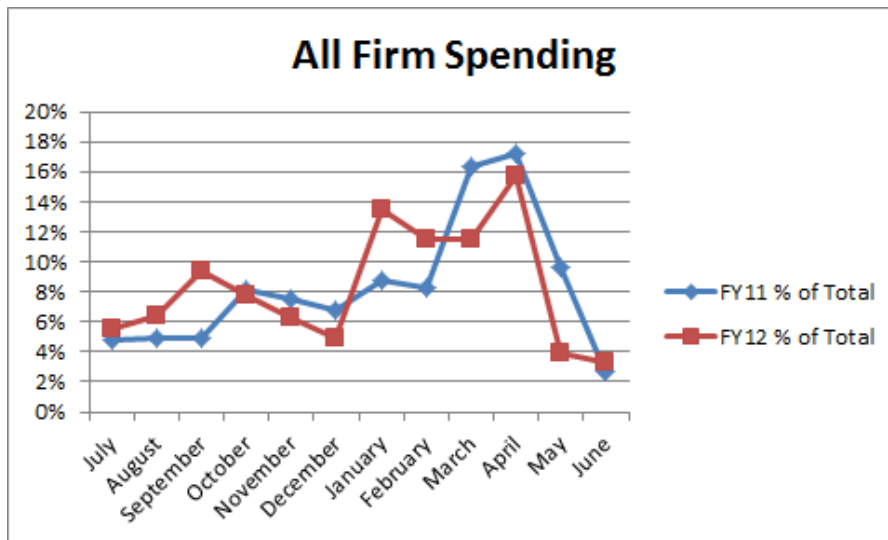


Figure 1. All Firm-Order Spending by Month, Fiscal Years 2011-2012

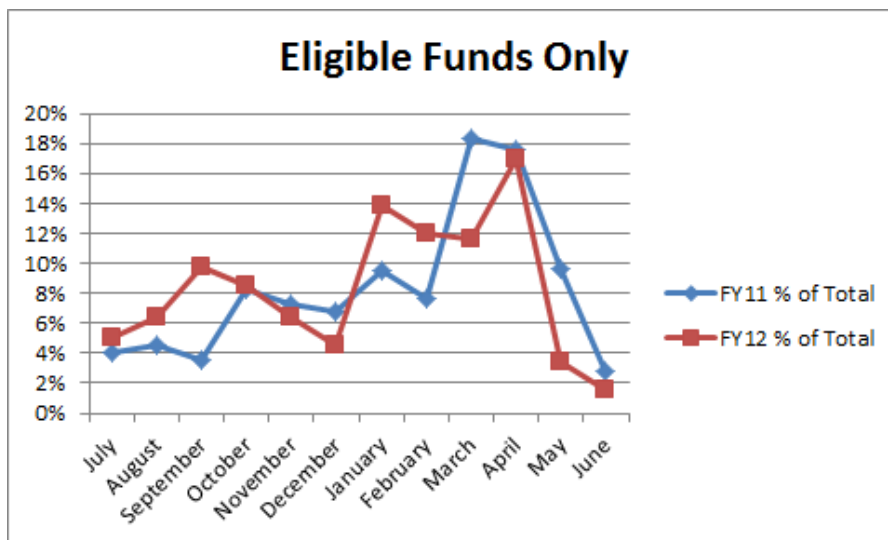


Figure 2. Firm-Order Spending by Month, Eligible Funds Only, Fiscal Years 2011-2012

As you can see, the FY11 line shows a major spike in the months of March and April, that is, immediately before and after the March 31 deadline. The FY12 line shows two smaller peaks, one in January and one in April.

To refine the analysis, I examined only the eligible funds. The pattern (Figure 2), is very similar to the overall pattern in Figure 1. This makes sense,

at least two cases, the department met the incentive target early without even being aware of the existence of the incentive. To answer this question, Figure 3 shows the results for just the winners. In this chart, there is a clear spike in January and an obvious downward curve in March/April. Therefore, for most of the winners, the presence of the incentive seemed to change behavior.

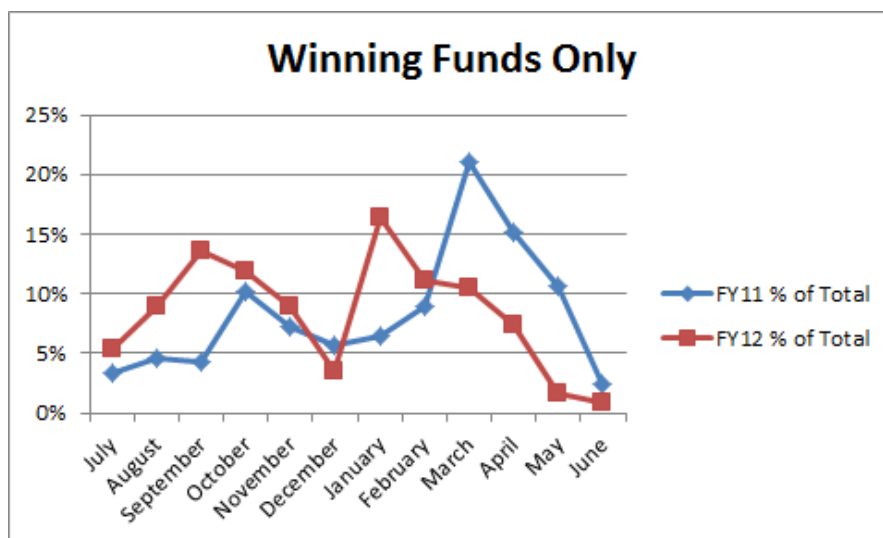


Figure 3. Firm-Order Spending by Month, Winning Funds Only, Fiscal Years 2011-2012

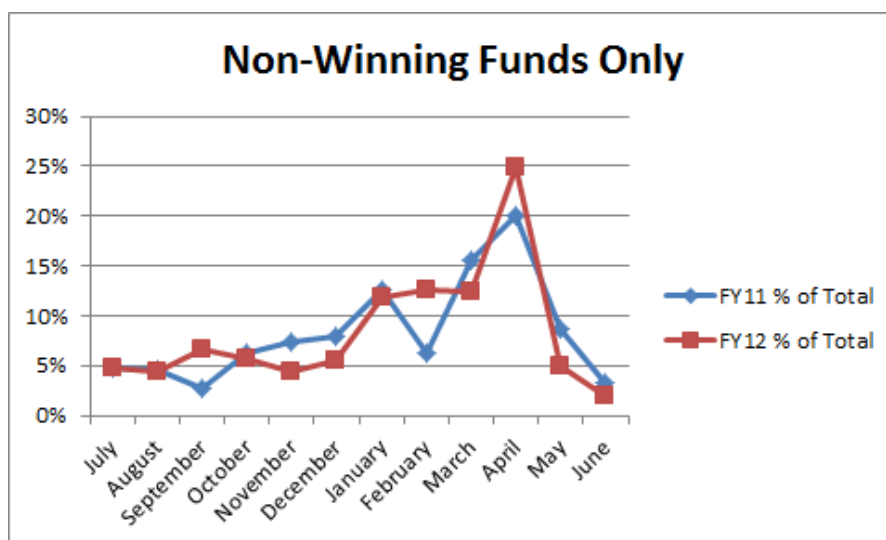


Figure 4. Firm-Order Spending by Month, Non-Winning Funds, Fiscal Years 2011-2012

Finally, I examined the funds that were eligible, but did not win (Figure 4). This group shows a sharp spike in April 2012, worse than April 2011. Also, pay attention to the February data points. For some non-winners, it is possible that the incentive acted perversely, as if the liaison deliberately waited until after the incentive deadline to place orders. At least two liaisons admitted that they deliberately spent less than the 65% by the early deadline, so that they would not have the burden of choosing even more

materials with their winnings. In these two cases, collections management had discussions with the liaison about reducing their monograph funds in favor of other types of materials that the department would find useful, for example, journals.

Therefore, from this small experiment, I conclude that an incentive may be modestly effective at regularizing spending and therefore acquisitions workload, if only by replacing one big surge with two smaller ones.